

# **Project Page Redesign**

Get more done in less time

We heard your feedback about the continuous scrolling and added white space on the Project page. So, we redesigned it to help you work more efficiently and better manage your projects. The Project Page redesign is automatically enabled for you with ST-58. There are no new permissions and no changes to the functionality available to you, so everyone can keep working as they did before, only much more efficiently now.

#### WHAT'S NEW

- ★ Inline editing of Custom Fields & Project Status
- ★ Navigation Menu to quickly jump to specific sections
- ★ Actions consolidated into one 'Actions' dropdown
- New Action Buttons found throughout page in their respective section

Click on the numbers to learn more about each section.

	PROJECT Capital Improvement Project #9472835 In Progress % Hide additional info	SERVICE LOCATION  Ct  California Science Center  700 Exposition Park Drive Los Angeles, CA 900	BILL TO         Mark Weeks         801 North Brand Boulevard #700 Glendale, CA         8056896015         Even View all contacts	Actions ~
Dashboard Project Overview Financials Project costing, invoices, payments	Permit Number 1902882	Pre-Site Complete Yes × v		
Jobs & Appointments Book or View Jobs Estimates Sold & Unsold Estimates Purchase Orders & Requisitions Technicians Team's Timesheets Audit Trail Notes, Events & Media	PROJECT MANAGER     Keegan     START DATE     O5/04/2021     TARGET COMPLETION ACTUAL COM     28/01/2022/_/      CONTRACT FOR CONTRA     CONTRACT FOR CONTRA     O5/04/	MPLETION ACT DATE Y2021 PROJECT DESCRIPTION Planned improvements per approved cap	pital expenditure plan	

#### **Navigation Menu**

The new Navigation Menu makes it easy for you to access the exact information you need in one click. No more endless scrolling up and down the page. You can quickly click to review Job & Appointment History, check Project Purchase Order status, audit timesheets, and more!

#### Dashboard Project Overview

Financials Project costing, invoices, payments

Jobs & Appointments Book or View Jobs

Estimates Sold & Unsold Estimates

Purchasing Purchase Orders & Requisitions

Technicians Team's Timesheets

Audit Trail Notes, Events & Media

#### Header

	PROJECT Capital Improvement Project #9472835 In Progress ProveNalling Wages Hide additional info	SERVICE LOCATION	BILL TO  Mark Weeks  801 North Brand Boulevard #700 Glendale, CA  8056896015  View all contacts	Actions ~
Dashboard Project Overview Financials Project costing, invoices, payments	Permit Number Pre 1902882 Y	-Site Complete 'es × ~		

The Header is always visible at the top of the page.

- 1. Any Custom Fields you've configured to display on the project page will now be listed here (Permit Number & Pre-Site Complete in the example above). If you want to hide these, click **Hide Additional Info**.
- 2. Inline editing lets you quickly change the project status, update custom fields, or change the image. Click the **Pencil Icon** next to the **Actions** button for all additional edits.
- 3. We've consolidated all of the same actions available to you in a new Actions dropdown. This saves you time from having to scroll to the top of the page if you need to book a new job..



Please note, the Add Application for Payment, Build Estimate, Add Invoice, and Create Payment action buttons are only visible to customers with Project Tracking enabled. The Add Purchase Order and Add Requisition action buttons are only visible to customers with Project Requisition functionality enabled. For more information on Project Tracking or Project Requisition functionality, please reach out to your CSM.

#### Dashboard

The Dashboard displays relevant project information such as the Project Manager, contractual information, and the description. Need to update key project dates? Click the pencil icon in the header.

PROJECT MANAGER	PROJECT DESCRIPTION Planned improvements per approved capital expenditure plan
START DATE           05/04/2021           TARGET COMPLETION           01/28/2022	
CONTRACT FOR CONTRACT DATE CapEx Improvements 05/04/2021	

#### **Financials**

The Financials section displays all information related to the project financials, including Project Summary\*, Budget vs Actual\*, Expense Details\*, Invoices, Created Payments, and Application for Payments\*. In addition, Jobs & Appointments have been moved to their own section for better organization.

BEFORE					AFTER			
<ul> <li>Project Summary: Lean More</li> <li>Add px</li> </ul>	concernor payment.	Financials						_
Amount Percent Complete Adds	d Requisition	Project Summary - La	am More					1
\$21,237.67 23%					Amount	Percent Comple	ite	
Cost to Complete \$72,382.33 tell.					Panoant	r creant compa		
Total 527,500.00 22%		Contract Summary			\$123,220.00	22% /		
Total Retainage \$2,750.00 2%								
Payments \$15,120.00		Expenses			\$20,960.00	22%		
Totals -1.9%								
AR Balance \$9,693.00		Cost to Complete			\$72,660.00	Edit		
A Displant or Anton		Total Earned			\$27,500.00	22%		
oget vs Actual		Total Retainage			\$2,750.00	2%		
xpense Details		leaded.			634 759 69	20.000		
		Invoiced			\$24,750.00	20.0346		
r Completin		Payments			\$15,120.00			
		Totals				-1.91%		
Project Opportunities Add another Project Opportunity #9473092 [1]		AR Balance			\$9,630.00			
Project Opportunity #9540419 (1)		Balance to Einich (Inclu	tion Retainage)		\$98.470.00			
Project Opportunity #9540931 (1)		Ditance to Finian preto	ang rocanage)		550,470.00			
Jobs 🕲	C View Calendar	Budget vs Actual >						
Job # Type First Appointment Last Appointment # of Appointments Technic	nicians Co	Expense Derails >						
9646891 Construction 12/06/2021 12/06/2021 1	Nev	Invoices						
9645507 New 12/02/2021 12/02/2021 1 Construction	NIV	Invoice #	Invoice Date	Status	Total	Payments	Balance	A
я ч 🛐 э. к	1 - 2 of 2 items	9475779	06/17/2021	Pending	\$15,120.00	\$0.00	\$0.00	
Appointments 🕲	I View Calendar	9544899	07/27/2021	Pending	\$9,630.00	\$0.00	\$9,630.00	
Job # Appointment # Job Type Start Date & Time Technisians		H H 1 F H						
9645891 9645891-1 New Construction 12/06/2021 07:00 am								
9645507 9645507-1 New Construction 12/02/2021 07:00 am		Created Payments						
H 4 1 F N	1 - 2 of 2 items	created Payments						
Application for Payments		Invoice #	Technicians	Paid On	Method	Amount	Status	Ap
Application #         Period to Date         Payment Due         Invoice #         Peyment         Balance           2         05/31/2821         08/26/2021         \$548099         \$9.00         \$3,630.00		9475779		07/27/2021	Check	\$15,120.00	Pending	
1 04/38/2821 07/17/2021 5475779 \$15,128.00 \$0.00		H 4 1 F H						
Payments Invoice # Technicians Paid On Method Amount Status App. for Pint #		_						
9475779 07/27/2821 Check \$15,120.00 Pending 1							-	
Invoices		Application for Payment					L	+ Add Ap
Invoice # Invoice Date Status Total Payments Balance App. for Pint #		Application #	Period to Date	Payment Due	Invoice #	*	Payment	Balanc
9463076 Veg 17/2020 948000 315,12000 305,000 1 5544899 07/27/2021 Pending 59,630.00 50.00 59,630.00 2								
Estimates Job # Estimate Sold Date Sold By Total Total Cost		2	05/31/2021	08/26/2021	954489	49	50.00	\$9,63
06/14/2021 Hinn Pandya 5119,200,00 \$58,700,00		1	04/30/2021	07/17/2021	947577	79	\$15,120.00	\$0.00
07/23/2021 manodemo \$2,700.00 \$3550.00		н н 1 н н						

#### **Financials Continued**

Let's walk through some of the other notable changes you'll see in the Financials section.

#### **Project Job Costing**

First, the Job Costing flyout has been moved to the top of this section and renamed Project Job Costing. Previously, you had to scroll to the bottom of the page, and it was a bit hidden between Purchase Orders and Technicians.

BEFORE

215 Grain	ger Hiren Pandya	06/17/2021 Rece	eived	\$13,960.00	
EEI \$24,750.00 Subtotal	@ \$0.00 @ \$2 Tot	4,750.00 😥 \$15,120.00 al Pavments	D ES \$9,630.00 Balance	20,960.00 Purchase Orders	
(31 \$0.00 Materials					
Job Costing					>
Technicians	A	Debiése		7.41	

Financials Project Summary + Learn More		View Project Costing
	Amount	Percent Complete
Contract Summary	\$123,220.00	22% /
Expenses	\$20,960.00	22%
Cost to Complete	\$72,660.00	Edit

AFTER

#### **Invoices & Payments**

We've made it seamless to add invoices\* and create payments\* by including each action button at the top of each table. Previously, the only way to add an invoice or payment was to scroll to the top of the page.

Invoices						+ Add Invoice
Invoice #	Invoice Date	Status	Total	Payments	Balance	App. for Pmt #
9475779	06/17/2021	Pending	\$15,120.00	\$0.00	\$0.00	1
9544899	07/27/2021	Pending	\$9,630.00	\$0.00	\$9,630.00	2
H 4 1 F H						1 - 2 of 2 items
Created Payments					_	Create Payment
Invoice #	Technicians	Paid On	Method	Amount	Status	App. for Pmt #
9475779		07/27/2021	Check	\$15,120.00	Pending	1
н н 1 н н						1 - 1 of 1 items

#### **Application for Payment**

For those using Project Tracking, you'll also find it easier to create new payment applications with the button also displayed at the top of the Application for Payment section. Similar to Invoices and Payments, this was only accessible at the very top of the page.

Application for Payment				+ Add	Application for Payment
Application #	Period to Date	Payment Due	Invoice #	Payment	Balance
2	05/31/2021	08/26/2021	9544899	\$0.00	\$9,630.00
1	04/30/2021	07/17/2021	9475779	\$15,120.00	\$0.00
H 4 1 > H					1 - 2 of 2 items

## Jobs & Appointments

The Jobs & Appointments section includes Jobs and Appointments related to the project. While these tables look similar to before, the most significant and most beneficial change you'll see is the ability to Attach Existing Jobs and Book New Jobs right from this section. So again, no more needing to scroll to the top of the page to do this.

			BEFORE									AFTER					
Jobs 😰					View 0	Calendar	Jobs	& App	oointments				View Calenda	r + Attach E	Existing Job	+ Book Net	w Job
Job #	Туре	First Appointment	Last Appointment ↓	# of Appointments	Technicians	Co	Job #	#	Type	First Appointment	Last Appointment	# of Appointments	Technicians	Completed On	Status	Total @	Tag
9645891	New Construction	12/06/2021	12/06/2021	1		N//	9645	5783	New Construction	12/06/2021	12/06/2021	1	(Connection)	N/A	Scheduled	\$0.00	Poter
9645507	New Construction	12/02/2021	12/02/2021	1		NØ	9645	5763	New Construction	12/02/2021	12/02/2021	1		N/A	Scheduled	\$0.00	Poter
н 4 1	► H				1 - 2 of	f 2 items	н	< 1	F F							1 - 2 of 2 i	Items
Appointme	ents 🛛				View 0	Calendar	Appoi	intments	\$								
Job #	Appointment #	Job Type	Start Date & Time	Technicians			Job #	n.	Appointment #	Job Type			Start Date & Time	Technicians			
9645891	9645891-1	New Construction	12/06/2021 07:00 am				9645	5783	9645783-1	New Construction			12/06/2021 07:00	am			
9645507	9645507-1	New Construction	12/02/2021 07:00 am				9645	5763	9645763-1	New Construction			12/02/2021 07:00	am			
н к 1	н				1 - 2 of	f 2 items	H	4 1	Þ. H.							1 - 2 of 2 it	tems

#### **Estimates**

Outside of the new look, you'll see three notable changes in the Estimates section:

- 1. Estimates and Opportunities\* are bundled in one section when previously they were separated on the page.
- 2. You'll see a persistent Build Estimate button\*.
- 3. When you click Build Estimate, you'll be able to either add it to an existing opportunity or create a new opportunity.

		BEFORE						
Project C	Opportunities Add another					Estimates		
Project Op	oportunity #9473091 (1)				~	All Estimates		
Project Op	oportunity #9540419 (1)				~	ESTIMATE ID 9473092	- 105 #	CapEx Improvements
roject Op	oportunity #9540931 (1)				~	ESTIMATE ID 9540420	- 108 #	CO1
						ESTIMATE ID 9540932	JOR #	NAME CO2
Estimat	tes							
Job #	Estimate Sold Date	Sold By	lotal	Total Cost		Opportunities		
	06/14/2021	Jamie	\$119,200.00	\$88,760.00		Project Opportunity	#9473091	
				£000.00		,		
	07/21/2021	Jamie	\$1,320.00	\$900.00				
	07/21/2021 07/21/2021	Jamie Jamie	\$1,320.00	\$3,960.00		Project Opportunity	#9540419	

AFTER	

STATUS Sold

STATUS Sold

Sold

Build Estimate

solo av Jamie

solo sv Jamie

0

a

SOLD DATE 06/14/2021

SOLD DATE 07/21/2021

SOLD DATE 07/21/2021 \$900.00

TOTAL COST \$3,960.00

Cancel

+ Build Esti

TOTAL \$119,200.00

TOTAL \$1,320.00

TOTAL \$2,700.00

## Purchasing

The Purchasing section includes all information related to Purchase Orders and Requisitions. In addition to the new look, you'll also be able to Add Purchase Orders and Add Requisitions directly from here (if Project Requisition functionality is enabled). Again, no more scrolling to the top.

BEFORE

Purch PO #	ase Orders Vendor	Techn	ician	Date		Status	Job #	Summary	Amount
216	Grainger	Hiren	Pandya	07/27/20	21	Receive	ł		\$7,000.00
215	Grainger	Hiren	Pandya	06/17/20	21	Receive	ł		\$13,960.00
<b>3 \$24,</b> Subt	750.00 💽 otal	\$0.00	🕑 \$24,75 Total	50.00	<b>2 \$15</b> , Paym	120.00 ents	\$9,630.00 Balance	) 📵 \$20,9 Purch	960.00 ase Orders
<b>9 \$0.0</b> Mate	0 erials								

Purchasin	g								
Purchase Or	rder					l.	+	Add Purchase Order	
PO #	Vendor	Technician	Date	Status	Job #	Summary		Amount	
215	Grainger	Hiren Pandya	06/17/2021	<ul> <li>Received</li> </ul>				\$13,960.00	
216	Grainger	Hiren Pandya	07/27/2021	<ul> <li>Received</li> </ul>				\$7,000.00	
н 4 1	► H							1 - 2 of 2 items	
lequisitions?								+ Add Requisition	
Requisition Name Technician				Date	Date			Status	

#### **Technicians & Audit Trail**

There are no significant changes to the Technicians or Audit Trail sections, just that you can now access them in one click from the navigation menu.

BEFORE	AFTER									
Technicians Photo Name Driving Working Total	Technicians									
Andre Young 3h 41m 9h 55m 13h 36m	Name	Driving	Working	Total						
Eric Wright 1h 8h 30m 9h 30m	No records available									
	Team Totals	0m	0m	0m						
Total Labor Burden \$178.50 1% Total Material Costs \$20,960.00 85%										
Total Cost \$21,138.50 85%										
BEFORE	AFTER									
History  Leave a note	Audit Trail         Image: Lawe a note         Image: La									
A 1202/2021 33 7 Min     Min Bio Cello p Cecke an Max Window Handbally     Min Bio Cello p Cecke an Max Window Handbally     Min Cello P Cecke A 11 Min Min Bio Cello p Cecke an Max Window Handbally     Min Cello P Cecke A 11 Min Min Bio Cello P Cecke A 11 Min Bio Ce		mordene skłed Pasant kwanie ta zaczosza 135 w roku przez 100 m roku przez	to job merit # 9645783-1 is for <b>06/12/2021 7:00 AM</b> from the appointment # 9645783-1 the appointment # 9645783-1 emo picked anival window manually to job							

BACK TO PAGE 1